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Food Policy as Public Policy

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Food Policy as Public Policy: A Review of the Welsh Government's Food Strategy and Action Plan

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Summary

- The former Minister for Natural Resources and the former Deputy Minister for Farming and Food asked the Public Policy Institute for Wales (PPIW) to provide expert advice on the state of the Welsh Government's current Food Strategy (Welsh Government, 2010) and the subsequent Action Plan (Welsh Government, 2014) and make recommendations on how they could be refined in the future.
- The Welsh Government's Food Strategy set out a vision for the Welsh food sector which sought to reflect the interconnections between food and wider policy objectives. The subsequent Action Plan narrowed the food policy focus in Wales. At the same time the actual macro-food policy agenda and its relevance to the well-being of Welsh businesses, communities and people has got significantly wider and deeper.
- This deepening set of food vulnerability conditions since 2010, for example increasing food poverty, poor diet and the reduction in the number of independent farm businesses, make it now far more urgent for clear policy visions and actions for achieving healthy and sustainable diets for all, with targets that can be monitored.
- This report suggests three key areas of concern in the current policy framework: the overall style and mode of governance adopted (including for example a lack of engagement with stakeholders and use of available policy levers); inaction on demand led tools; and a lack of focus on food poverty.
- This report proposes 15 recommendations to address this including:
 - Placing sustainable diets at the heart of food and nutritional policy through adopting successful public health interventions such as Food for Life and bolstering public sector food procurement and catering provision;
 - Providing support for farmers to produce less intensive, more sustainable, and higher food quality products through more diversified sets of supply chains;
 - Increasing investment in 'the missing middle' infrastructure of the food supply chains;
 - Progressing research, development and extension in sustainable production and consumption systems;
 - Expanding horticulture;
 - Effective monitoring in line with the Well-being of Future Generation Act goals;
 - Creating a full Welsh Government Cabinet Minister for Food; and
 - Creating an active network of food sector Partnership Boards.

Introduction

The former Minister for Natural Resources and the former Deputy Minister for Farming and Food in Wales asked the Public Policy Institute for Wales (PPIW) to provide expert advice on the state of the Welsh Government's current Food Strategy 'Food For Wales, Food From Wales 2010|2020' (Welsh Government, 2010) and the subsequent Action Plan 'Towards Sustainable Growth: Action Plan for the Food and Drink Industry 2014-2020' (Welsh Government, 2014). This is in light of earlier advice commissioned by the PPIW which suggested that the current Action Plan was too narrowly focussed on food production and that both policy statements should now to be seen in the context of the Well-being of Future Generations Act (2015). This work builds on this by exploring three areas:

1. the value of the current Welsh Food Strategy and Action Plan;
2. gaps in the current Welsh Food Strategy and Action Plan; and
3. proposals as to how the Welsh Food Strategy and Action Plan could be refined in the future.

This report begins by examining the context in Wales, reviewing the Welsh Government's Food Strategy and Action Plan and drawing out lessons to be learnt. It goes on to make recommendations for a revised food policy for Wales.

Current Context: Government Policy and Sector Developments

Government policy over the last six years

The Welsh Government's Food Strategy, 'Food for Wales, Food From Wales 2010|2020' (Welsh Government, 2010), was produced as an agreed strategy document by the then Food and Drink Advisory Partnership Chaired by Dr Haydn Edwards and including 19 stakeholders from the food and farming industry in Wales. The strategy was endorsed by the then Minister for Rural Affairs, Elin Jones. The authors of this report led the research consultancy consortium upon which the strategy was researched and subsequently written.

The strategy provided a common framework with a vision; and this was to be followed by a regularly updated delivery plan. The strategy called for and outlined an integrated approach across policy areas and was built upon the overriding theme of 'building connections and capacities'. It outlined four key principles and set out their main parameters. These were:



- sustainability;
- resilience;
- competitiveness; and
- profitability.

This provided the basis for five key policy drivers around which a series of actions were proposed. These were:

- market development;
- food culture;
- sustainability and well-being;
- supply chain efficiency; and
- integration.

A delivery plan was to be developed in partnership with the industry and actively involving the Food and Drink Advisory Partnership¹, sectoral Strategic Action Plans and an annual review process supported by strategic indicator monitoring. A clear vision was presented as to where this would take the Welsh food sector by 2020 (this vision is contained in Annex 1). It envisaged the food sector as an integrating mechanism bringing together greater national and cultural identity for Welsh food, a partnership approach, and strong domestic links between food, economic development and regeneration, health improvements, tourism, community development, education and skills, and food procurement. In this sense it could be seen as a forerunner to the wider Well-being of Future Generations Act (2015) with its seven overarching major goals of: prosperity, resilience, health, equality, community cohesion, vibrant culture and global responsibilities.

However, it would appear that the Food Strategy was never implemented and that there was a hiatus from 2010 until the birth of the narrower and more focussed Action Plan (Welsh Government, 2014) in 2013-14. This Action Plan followed another lengthy consultation exercise, and the setting up of a revised Food and Drink Wales Industry Board² (dominated by food industry and industry specialists) to drive the Action Plan forward between 2014 and 2020. The focus of the plan was to advance the economic impact of the food industry, with the overall goal to grow sales of the Welsh food and drink sector by 30%, to £7 billion by 2020, with a corresponding 10% growth in Gross Value Added in the sector over the same time

¹See

<http://gov.wales/topics/environmentcountryside/foodanddrink/foodpolicyandstrategy/fdap20102011/?lang=en>

²See <https://businesswales.gov.wales/foodanddrink/food-and-drink-wales-industry-board>

period. The Food and Drink Wales Industry Board were charged with playing “a key role to ensure (we) embed sustainability, competitiveness, efficiency, productivity, and profitability throughout the food and drink industry” (Welsh Government, 2014, p.5) (for a list of the 48 actions see Annex 2). The then endorsing Minister for Natural Resources and Food, Alun Davies AM, introduced the Action Plan as one which “focusses on what happens to food once it leaves the farm” (Welsh Government, 2014, p.2) thus proposing not only a narrower economically designed plan, but also one which divorced farm-based production from its down-stream sectors. The emphasis of the 48 actions (see Annex 2) was on branding, enhancing exports, streamlining and integrating downstream supply chains, developing skills, aspiring to lower carbon targets and stimulating community food initiatives. The main agents to achieve this were the Welsh Government, the Food and Drink Wales Industry Board and the Higher and Further Education sectors. There were no specific actions for different types of food sectors or types of production systems. The Welsh Government also made the decision to remove the Wales True Taste brand³, and replace them with a broader and more ‘trade-focussed’ ‘Wales’ umbrella- Food and Drink Wales⁴ run through the Welsh Government.

Overall the Action Plan focussed upon post-farm food supply chain development, and as such it separates itself from addressing both primary production policy and actions and the wider food and consumption changes.

A recent Welsh Government annual progress report (WGFD, 2015) produced by the Food Division indicates some positive progress being made with regard to the Action Plan; although not all 48 actions are detailed. There has been a growth in annual turnover (reported £5.8 billion) giving an 11.5% growth since 2012-13, £10.8 million of new government business investments in 2014-15 safeguarding 1,365 jobs and creating 450 new jobs, and significant investment in export trade engagement. Trade events in 2014/15 resulted in Welsh food firms securing nearly £6 million additional business, with further opportunities identified of over (potentially £16 million).

In sum, it is clear that the Action Plan has provided a much narrower, and largely post-farm/downstream and supply side approach to Welsh food policy. This has also tended to be more top-down government and industry board-led, and it has focussed mainly, and then only partially upon two of the five original policy drivers and areas developed in the Food Strategy - namely market development and supply chain efficiency. It has largely excluded the farming

³See <http://www.bbc.co.uk/news/uk-wales-23342260>

⁴See <http://businesswales.gov.wales/foodanddrink/>

sector within this policy field, tending to retract it back into its EU Common Agricultural Policy (CAP) oriented policy silo.

Sector developments: Changes in the policy landscape

A number of key emerging trends have gained far more significance since the publication of the Food Strategy (Welsh Government, 2010), which, in turn makes its' substantial revision and implementation all the more urgent. Since the development of the Strategy in 2010 the Welsh agri-food sector has, by and large, become less resilient and more vulnerable to a set of exogenous and endogenous factors (see Figures 1 and 2 below). In the main this is a consequence of the divergence between policy, which has got regressively narrower in Wales, and the macro-food policy agenda, which has become significantly wider and deeper, with relevance to the well-being of Welsh businesses, communities and people.

There are several key developments which have been the subject of recent UK policy and scientific concern (see for example Tait, 2015; APPG-HFP, 2014; 3Keel/ISU, 2015; Morgan, 2015; The Food Foundation, 2015).

- Since 2010, food poverty and food inequality has grown across the UK and in Wales especially for low income groups, such that it is increasing and compounding health and well-being inequalities more broadly and more spatially than in earlier periods (see Tait, 2015).
- There has been a further reduction in the number of independent farm businesses. Wales for instance lost over 250 dairy farms between 2009 and 2012. The Welsh farming and local processing sector has become even more dependent upon downstream corporately controlled food processors and retailers located outside its boundaries (see Adams, 2015).
- The effects of climate change, not least an apparent greater propensity for flooding, are having greater impacts on food production; and livestock producers in particular are coming under greater pressure to reduce carbon emissions (Transmango, 2014; The Scottish Government, 2014; Garnett, 2014).
- Carbon emissions and bio-diversity loss arising from the food sector need to be significantly reduced (Welsh National Assembly Environment and Sustainability Committee, 2014; European Commission, 2016). Food and farming need to play a central role in Wales' ambitions to reduce carbon emissions by 85% by 2050 (Environment Act, 2016).

- Several key initiatives related to local and more sustainable food sourcing (e.g. Wales True Taste), and procurement initiatives have been abandoned or reduced⁵.
- There has been a growth in urban-based multi sector food councils and cooperative initiatives and arrangements connecting food consumers with producers (e.g. Cardiff Food Council⁶).
- There are major funding opportunities so far untapped regarding the, among other programmes, the use of the new 2015-20 EU Rural Development Programme to stimulate sustainable adaptive change in the food and farming sectors (RELU, 2016; European Commission, 2016).
- There is a continued and increasing demand for locally grown, shorter and more diverse food supply chains by consumers (Welsh Government, 2010). This needs to be promoted.
- In Wales, there have, since 2010, been a raft of new policies (Well-being of Future Generations Act, Local Government Reform, Planning and Environment Acts, Green Growth) which all have implications for the agri-food sector and to which the sector needs to positively respond and now be aligned to.
- Globally, sustainable food had risen up the political agenda now forming a major part of the new UN Sustainable Development Goals and Sustainable Cities and Regions agenda. It is now no longer seen as a narrow sectoral issue, but a major vehicle for delivering low-carbon sustainable transitions more generally. This is challenging governments around the world at different levels (e.g. the Milan Urban Food Policy Pact⁷) to revise their food policies.
- A range of food nutritional research is showing that (i) the diets of typical British families now pose the greatest threat to their health and survival; (ii) healthier choices are limited, not understood and, more expensive and poorly promoted; and that (iii) good nutrition underpins strong economies (The Food Foundation, 2014).

These deepening set of food vulnerability conditions since 2010 make it now far more urgent for a clear policy vision and actions for achieving healthy and sustainable diets for all, with targets that can be monitored.

⁵ See for example <http://www.bbc.co.uk/news/uk-wales-23342260>

⁶ See <http://foodcardiff.com/about-food-cardiff/cardiff-food-council/>

⁷ See <http://www.foodpolicymilano.org/en/urban-food-policy-pact-2/>

Gaps in the Current Policy Framework

As noted above, over the last six years there has been a divergence between government policy, which has narrowed its focus, and the policy landscape, which has broadened its focus to encompass the interconnections between food production and consumption and a wide range of policy areas. This section considers the implications of this for the current policy framework, delineating three key areas of concern: the overall style and mode of governance adopted; inaction on demand led tools and lack of focus on food poverty.

Questions of governance

A major issue to deal with in this analysis is the overall question of agri-food governance in the Welsh context. In this sense the ‘gaps’ are not just about substantive policy aims and objectives, but also the modus operandi of food governance itself. This is thus an important element of the eventual delivery of policies. Indeed, it can affect the very success or otherwise of the actual delivery of strategies.

Five areas in which the current governance arrangements (structures and foci) need to be broadened are discussed below:

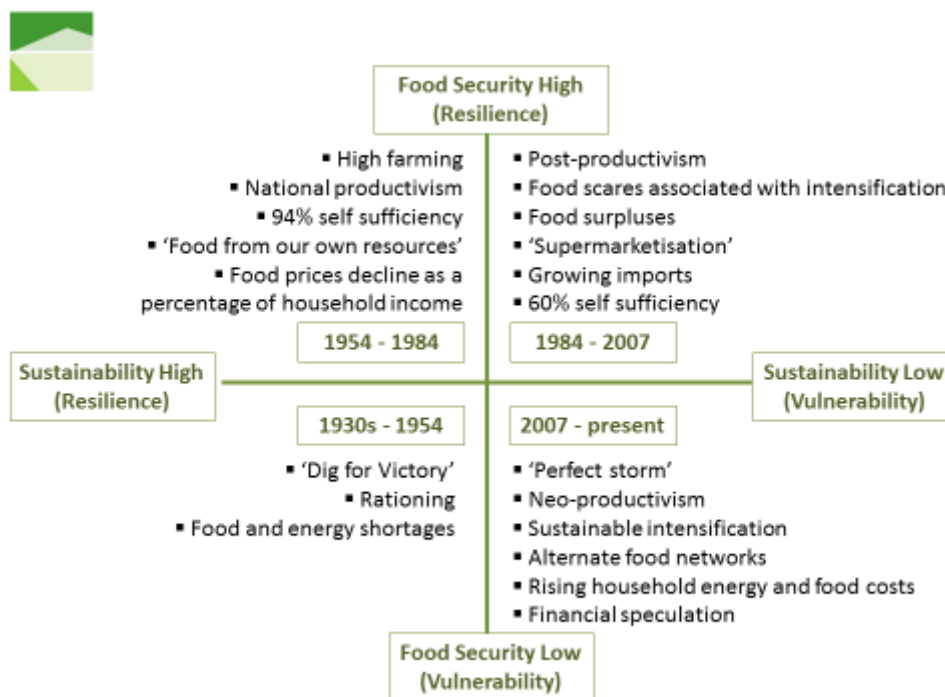
- engagement with stakeholders from across the agri-food system;
- use of available policy levers;
- driving innovation for systemic and adaptive change;
- creating space for challenge and reflection; and
- focusing on the key dimensions of vulnerability in the Welsh food system.

If these governance issues could be addressed, it would enable the development of a more de-centred governance framework for agri-food in Wales. One which, to echo the 2010 Strategy, involves really building connections and capacities. With up to 14,000 farming businesses and 23,300 food businesses, not to mention the associated and highly mutually dependent tourism and catering sector, the challenge is to create a more effective and distributed governance framework.

Firstly, given the growing wider public and civic interest in agri-food it is necessary to significantly widen the vector of bodies, NGOs, interest groups and civic organisations having a say in agri-food policy development, and especially implementation. This is now an EU wide phenomenon, and Wales needs to be at the forefront of promoting more inclusive food related engagement in policy development. Recent research (e.g. Transmango, 2015) and engagement activities have shown us that there is an explosion of organisations /stakeholders

in the agri-food sector which now need to be included in the dynamic governance and policy-making process. This is partly a response to the increasing vulnerability both in terms of sustainability and security being experienced in the current UK food system (see Figure 1). Leaving the responsibility for the enactment of food policy to a relatively small industry and executive-led board risks failing to meet the challenges Welsh agri-food now faces. Governance arrangements need to be bold, mature and reflexive enough to encapsulate this diversity, and progress towards a collective approach.

Figure 1: Positioning food security and sustainability in the UK



Source: Marsden, (in press).

In addition to the need to vastly increase the vector of effective and reflexive policy inclusion comes the issue of symmetry of policy direction and intentionality of purpose. Here we see that the extant strategies and action plans have been somewhat 'lopsided'. With the 2014 Action Plan in particular, with all its focussed and meaningful intentions, it is based upon the assumption that affecting change to the food supply chain to make it work more effectively will mean that more innovative Welsh products will begin to flow down those supply chains and be exported across the world. Hence the highlighting of value adding and skills. So the overall emphasis has been and is upon streamlining the 'supply' side of the food equation, with the connotation that governments are these days limited as to what they can do with regard to demand management and development. As set out below, evidence suggests that these need to be complemented by adept and smart forms of creative demand management. So another

widening vector issue relating to governance concerns the need to redress the balance of attention on demand as well as supply.

A third broadening principle concerns the issue of the reliance upon the stimulation of improvements in technical product innovation, over and above the wider and deeper systemic and adaptive change⁸. The resilience and sustainability literature is demonstrating that it is also necessary to foster social and organisational innovations which lead and stimulate the capacity to create adaptive change. One way of achieving this would be to attach conditions to any monies going into the agri-food sector (either from Welsh Government or from the EU) which leads to adaptive change in a systemic and enhancing resilience manner. As prerequisite for adaptive change, Wales needs to agree an overall revised vision and direction of travel for its food sector.

A fourth governance principle, beginning, but not developed in the 2010 Food Strategy, is the need to create more 'collision space' and interfaces, as well as structured mediation between the traditional vested interests in agri-food and food consumers and their institutional agencies, like hospitals, schools, firms, universities, farming unions, and to put agri-food innovation at the centre of this. Welsh universities need to be far better coordinated in this regard (see for example the Northern universities, N8 Agri-Food Resilience Programme⁹, and the South West Food and Agriculture Alliance work and programmes¹⁰). Wales as an effective and innovative agri-food research and development (R&D) region is becoming marginalised, and part of this is down to the regressive fragmentation and now competition between Welsh universities. These institutions need to start taking the collective and coordinated lead as a major public sector player.

Finally, there is now an urgent need for governance to address the multi-dimensional issues of vulnerability in the Welsh food system across its varied supply chains. Increasing vulnerabilities and declines in individual, household, firm and farm security have grown since 2010, and this is partly due to a lack of systemic thinking about its multidimensional and interlocking features (see Figure 2 below). It follows that in order to build and develop a more resilient system the key dimensions of vulnerability become the starting point to a revised agri-food strategy. Figure 1 above positions the period 2007- present as historically a combined period of food sustainability and security vulnerability (Marsden, in press). Figure 2 maps

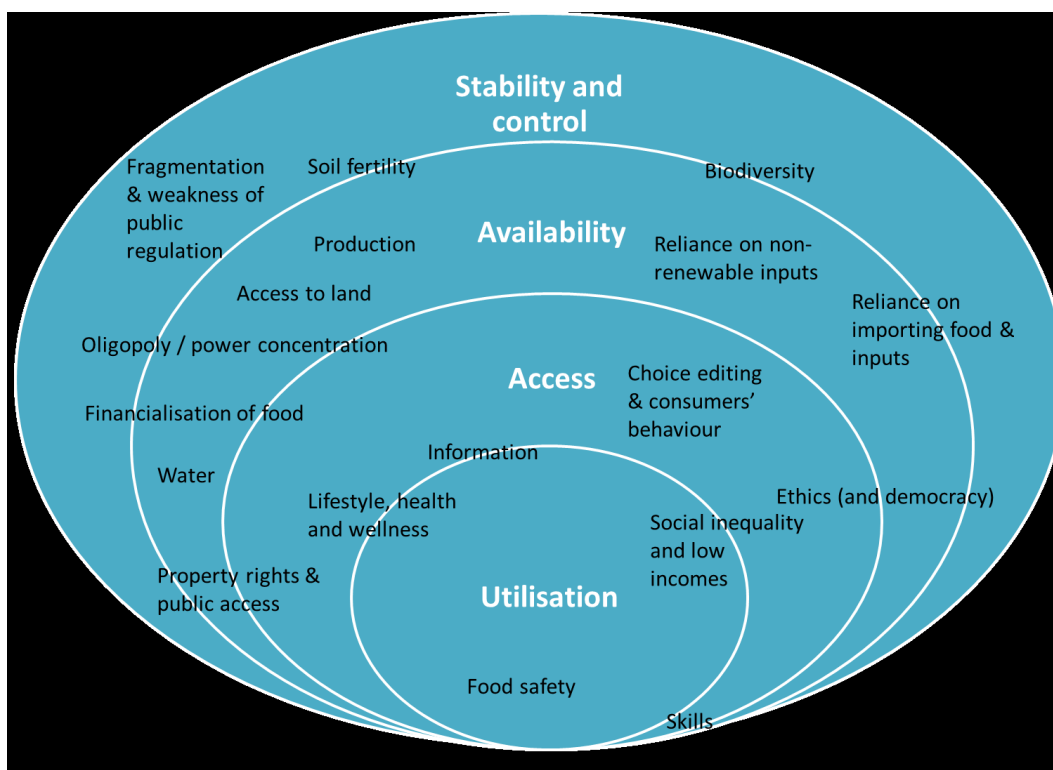
⁸ See, for example, the recent Welsh Government investment in the NutriWales Cluster <http://www.mediwales.com/members/nutriwales/>

⁹See www.n8agrifood.ac.uk/

¹⁰See www.fslra.ac.uk

current vulnerabilities and their food and nutritional outcomes arising from a current pan EU research project (Transmango, 2014).

Figure 2: Food vulnerabilities and outcomes



Source: Transmango, (2014)

Good food for all: Addressing demand as well as supply

Perhaps the largest deficit in Welsh food policy over this hiatus has been inaction on demand led tools to deliver a more sustainable and prosperous food system. Although efforts have been made, these appear largely piecemeal, particularly in comparison to the action on production and exports underpinned by the Action Plan (Welsh Government, 2014).

Consumption as a locus for food policy has come to the fore in recent years. Across the leading regions and localities effecting progressive food policy, the weight has clearly shifted towards issues such as public health, food poverty and sustainable diets. Much of the pioneering developments in food policy now spring from urban areas with a natural emphasis on how food is consumed and its impact on individuals as well as the wider environment and economy. This is not to discount the rural voice, or the importance of primary food production; rather it is to argue that a Welsh food policy that is fit for the future must be better aligned with food consumption trends – and these trends strongly suggest that consumers are becoming ever more conscious of the health and environmental impacts of their diet (Mintel, 2015a; Mintel,

2015b). It is also worth remembering the true economic shape of the food sector. Of the 222,400 people currently employed in the Welsh food and drink supply chain, 146,000 people (65%) are located at the consumer end, working in retail, wholesale and catering (Welsh Government, 2015).

The reasons for the relative side-lining of health and other consumption issues in food policy are understandable even if they are not sustainable. Food policy has its roots in agricultural policy and despite some positive rhetoric (such as that found in the Food Strategy document), silo thinking remains prevalent - particularly in complex and contested areas of governance such as food. In particular, health professionals and educators need to play a more prominent role in shaping public policy in the agri-food sector so that Welsh food policy helps to foster rather than frustrate the provisions of the Well-being of Future Generations (Wales) Act which came into force in April 2015.

One of the public policies with the greatest potential for promoting positive change through consumption remains public procurement. As outlined in the Senedd discussion paper *Good Food for All* (Morgan, 2015), Wales still has a long way to go to fully harness the potential of the public plate and it would do well to emulate the Scottish Government's *Good Food Nation* policy process (The Scottish Government, 2014).

In the health arena, strides are being made within the NHS, building on the All Wales Nutritional Standards¹¹, and through the further incorporation of healthy food into the Corporate Health Standards¹². Many challenges remain, even within health, for example, in how to balance the nutrient and energy rich needs of many inpatients with general healthy eating standards for other NHS users.

Food retail is an area traditionally overlooked by policymakers, partly due to EU state aid rules but also, no doubt, due to the imposing presence of the multiple retailers. Yet, high streets and suburban shop rows are vitally important for communities. Recent years have witnessed increased penetration of the supermarkets into suburban centres through their investment in the convenience store format. While supermarkets appeal to cost and convenience factors, the real impact of this pervasive trend for the social and economic fabric of the food sector and local communities is at best questionable.

¹¹ See <http://gov.wales/topics/health/publications/health/guidance/nutrition/?lang=en>

¹² See <http://www.wales.nhs.uk/governance-emanual/corporate-health-standards>

Countering austerity

Food poverty clearly remains a pressing issue in Wales and one that has largely been tackled outside of the Food Strategy implementation process. The rise of food banks and the embedding of supermarket food redistribution schemes, whilst meeting the short term needs of the economically disadvantaged, risks the institutionalisation of food poverty without addressing its root causes. The rise in food poverty, perhaps more than any other arena of food policy, demonstrates the multidimensional nature of food and the challenges this creates for policy makers. The causes of food poverty are complex, encompassing household income, education and socio-cultural values as well as accessibility in its broadest sense which is inextricably linked to the form and function of the food industry itself. It therefore must be at the heart of any genuinely strategic approach to food policy in Wales.

Towards a More Demand-Led Production Arena

In seeking to respond to the analysis above, the starting point should be the strategic need to make far stronger connections between the real sustainable consumption and production of Welsh food by creating a far more public demand-oriented food system which delivers diverse sustainability and nutritional health benefits both to the people of Wales and its consumers beyond. This means putting food at the centre of public policy making. This can and should contribute to reducing the interconnected sets of vulnerabilities outlined above. This will also mean that new coalitions and partnerships will need to be built between producers, processing and consumer interests in progressing a clear and engaging vision. Wales needs a new social contract between farming, the food industry and consumers, based upon a shared vision and an engaging set of mutually reinforcing policy levers.

The following package of interconnected recommendations are thus derived from both the current analysis outlined above about the emerging gaps - in both policy and governance - and the wider and deeper vulnerabilities. They are also derived from the authors' independent research and wide-ranging policy engagements over the period since 2010 which has involved both international and national research in the broad arena of food and nutritional policy.

The recommendations are also designed to be realistic and achievable whilst being ambitious and innovative in ways which will create overall economic, ecological and social efficiencies in the medium-to-long-term delivery of wider public policies more generally. In this way they should be embraced as a means of enhancing government performance at central and local levels. In this sense they are closely connected to and part of the goals and principles of the

Well-being of Future Generations legislation and implementation, not least in affecting all public authorities in developing well-being plans and public service boards. They will contribute significantly to building more economic and social resilience, lead to healthier communities, and foster ecological diversity and 'green growth'. They will require leadership and partnership in equal measure.

Maximising the contribution of the public sector

The 'public plate' cannot reach its full potential until the function of public procurement is recognised as a vital part of a successful and sustainable public realm. Procurement professionals have to be afforded the status and provided with the skills necessary to maximise the states purchasing power, not just in terms of value for money but also 'values' for money; in other words, social, environmental and economic benefit. Effective sustainable procurement requires an openness to doing things differently, balancing often conflicting priorities and engaging with stakeholders that goes far beyond conventional purchasing skills.

The Welsh Government have some work underway to improve public sector procurement in this area. The National Procurement Service (NPS) are developing a bespoke Food Team, the structure of which has been agreed by the Food Category Forum¹³, and have developed the NPS Food Strategy which plans how the Wales Procurement Policy Statement¹⁴ will be delivered upon in relation to food. Nonetheless, **sustained investment is needed, both in existing professionals and also in new specialist procurement officers across the public sector and not just focused on food.** Although Welsh Government has gone some way into tackling this skills gap through the *Home-Grown Talent* Project (GSR ,2015), the investment of £10.9 million over five years is not enough. **Specialist Sustainable Procurement Officers with remits that span the entire public sector in Wales would go a long way to raising the profile of this vital function of government.** They must, however, also be **supported by the strategic policy framework and, crucially the stakeholders and the organisational level they are ultimately purchasing on behalf of.** Too often, lone voices advocating greater sustainable procurement within organisations are frustrated by counterproductive institutional cultures, particularly from more senior levels of management. Indeed, consideration should be given to legislative tools in this area that could override these barriers. The uniqueness of food should be recognised at all levels of procurement within the Welsh public sector. Conventional 'category management' approaches, like that used by the

¹³ For more information on the Food Category Forum, see <https://businesswales.gov.wales/foodanddrink/sites/fooddrink/files/Presentation%20-%20NPS.pdf>

¹⁴ For more information on the Wales Procurement Policy Statement, see <http://gov.wales/docs/prp/toolkit/june15walesprocurementpolicystatement2015v1.pdf>

NPS's Food Team, and corporate retailers and risk perpetuating many of the failures of the food industry to address sustainability and the value-creating potential of food.

Maximising the impact of sustainable procurement is not just about buying the right products, it is about using it as part of a clear and consistent message that demonstrate the benefits of using these products to end users. In the area of food, this is obviously connected to providing messages about the benefits and trade-offs in terms of health, climate change, local economic development and enjoying good food. Welsh policy makers have the potential to harness one of the most innovative and successful health and sustainable food programmes in the world: Food for Life¹⁵.

Food for Life (FfL) has two elements which can directly contribute to raising the power of the public plate. Firstly, the FfL Catering Mark currently ensures the sustainability criteria of over a million meals a day across the UK. By employing a three level system (bronze, silver & gold), based on objective sustainability criteria, both private and public caterers are able to access a framework to deliver sustainable food and demonstrate this to their end users. Though Welsh Government's own catering contractor is required to satisfy a number of standards, and the number of Welsh suppliers and items of Welsh produce used on their catering contract have increased, Welsh Government has the opportunity to demonstrate its commitment to good food further by **adopting the FfL Catering Mark** across its catering service and, crucially, by promoting its uptake among its delivery partners across Wales¹⁶. Secondly, perhaps the most important arena in the public realm for promoting sustainable and healthy food, the education sector, could be specifically addressed through the **adoption of the FfL Partnership model**. This is a *whole school* approach to food that combines school food provision with a range of educational messages around growing, cooking and food choices. In the area of health, Welsh Government already have some work underway to promote good practice in schools via the Welsh Network of Healthy School Schemes, in which nearly all maintained schools are actively involved in, and provisions within the Healthy Eating in Schools (Wales) Measure 2009 and the Healthy Eating in Schools (Nutritional Standards & Requirements) (Wales) Regulations 2013. Nonetheless, there is an opportunity to build on the success of *Appetite for Life* (Welsh Government, 2008)¹⁷ and the work of the *Welsh Network*

¹⁵ See <http://www.foodforlife.org.uk/what-is-food-for-life>

¹⁶ Welsh Government have been considering the FfL Catering Mark and whether it would fit in conjunction with the current NPS Food Strategy. The Scottish Government are currently evaluating the FfL Catering Mark which should result in valuable learning for Welsh Government.

¹⁷ Which notably includes the development of the Healthy Eating in Schools (Nutritional Standards and Requirements) (Wales) Regulations implemented in 2013.

of Health School Schemes¹⁸ and provide both a firm grounding to the next generation of Welsh food purchasers and provide market led support to food producers and intermediaries across Wales via the FfL Partnership model.

The recent successful pilot of the School Holiday Enrichment Scheme¹⁹ (SHEP) in Cardiff demonstrates how existing infrastructure and resources can be better utilised to further the effectiveness of the public realm in this age of public sector austerity. The SHEP scheme provided healthy living resources during the Summer of 2015 in five sites where children were able to take part in physical activities and have access to a nutritious meal during the school holiday period. As well as directly tackling health related inequalities, the scheme provided employment for caterers and teaching assistants and has the potential to support supply chain development and training opportunities.

Consumers and consumption

One of the key trends since the 2010 Food Strategy has been the mainstreaming of the concept of sustainable diets. Driven by a greater realisation of the food system's impact on environmental sustainability (chiefly through climate change) and human health (chiefly through the so called obesity epidemic), the concept of sustainable diets highlights the links between healthy eating and environmentally benign forms of food production. Although the relationship is contested and highly nuanced, not least due to the interplay between socio-cultural factors and human metabolism, a sustainable diet can be characterised as one that is low in animal protein, low in processed foods and high in fruit and vegetable consumption (Garnett, 2014).

From a Welsh food perspective, the growing weight of evidence against red meat consumption is something that has to be tackled head on, both from the human health perspective and in terms of mitigating its effects on the lamb and beef sector. **Farmers and intermediaries must be supported to produce less intensive, higher quality output. Moreover, this transition needs to start today, in order to foster the cultural shift needed across the sector, as well as among Welsh consumers** (Chatham House, 2015). Clearer and more coherent messages need developing which integrate and enhance existing schemes (such as Farming Connect, the Rural Development Programme (RDP) Sustainable Production Grant Scheme

¹⁸ See <http://www.wales.nhs.uk/sitesplus/888/page/82249>

¹⁹ See <http://foodcardiff.com/our-summer-school-programme-hailed-as-a-lifeline-in-bbc-coverage/>

and the development of a wider range of EU Protected Food Names) around the concept of Sustainable Intensification, Diversification and Productivity.²⁰

In a bid to influence the population's consumption habits to more closely align with dietary recommendations, Welsh Government are already going some way to supporting behaviour change via the social marketing campaign, Change 4 Life Wales and contributing to the development of a UK front of pack nutrition labelling scheme. Commitments were also made in the Tackling Poverty Action Plan Annual Report 2015 to develop a better understanding of food poverty in Wales and how to tackle it. Some work has been done to understand how best to support Welsh food companies to produce healthier products, for example via the Food for the Future project and NutriWales, a collaborative forum for innovation, R & D and new product and trade development. Furthermore, Welsh Government have signed up as an Engagement Partner to Courtauld 2025 committing to help reduce resources needed to provide food and drink by one-fifth in ten years. In support of this aim, Welsh Government provide funding for WRAP Cymru, who support on the delivery of targets for waste prevention and resource minimisation, and have also contributed towards the development of the Sustainability Toolkit through the Rural Development Programme 2007-14 Supply Chain Efficiencies Scheme.

Nonetheless, it is estimated that over £5.5 billion is spent each year by consumers in Wales in food retail and a further £2.2 billion in food service. Although the scope for influencing this spend is far less than that of public sector food purchases, **there remains much more work that can be done to encourage and aid consumption habits that are in line with Welsh food policy goals as well as mitigating global food sustainability and security issues.** The health sector has a long record of public health campaigns designed to influence consumer behaviour. Over recent years, celebrity chefs have had notable success in delivering messages to the general public. The sustainable diet agenda calls for concerted efforts to influence consumer expectations and behaviour. In the future we are likely to see more and more emphasis placed on empowering consumers to make more informed decisions about their food choices – like the “activity equivalent” calorie labelling scheme designed by the Royal Society for Public Health, which aims to provide easily understood labels to show consumers how much activity would be required to burn off the calories contained in food and

²⁰ The concept of ‘sustainable intensification’ is a specifically different approach to the more widely termed ‘sustainable intensification’ which is characterised, as achieving ‘more for less’ through adapting agricultural practices which still increase intensification. We argue that in Wales less intensification of production is needed and should be encouraged, and that this process does not necessarily reduce productivity or ecological efficiency but can enhance sustainable practices and farm livelihoods by adopting a larger variety of production practices harmonised with increasing food quality. RDP funding and its range of schemes should be designed to foster these adaptations in production practices.

drink (for example, a person would have to walk for 26 minutes or run for 13 minutes to burn off a typical 330ml can of soft drink, which typically contains 138 calories) (RSPH, 2016). Empowering consumers along these lines is a trend that is set to continue in the years ahead as policy-makers seek to redress the noxious effects of the obesogenic environment, albeit within the confines of public sector austerity and growing food poverty. This agenda also needs to be embedded into the delivery and monitoring of the seven goals of the Well-being and Future Generations (Wales) Act²¹, and close liaison between the Food and Public Health Divisions of Welsh Government and the All Wales Food Poverty Alliance²².

Exports and branding: Putting sustainable farming at the centre

Whilst considerable emphasis is now being placed upon increasing the export of Welsh food products (total of £302 million in 2014) (that is 'food from Wales'); the Action Plan has tended to give less attention to the changing needs of the Welsh Consumer (that is 'food for Wales'). Welsh dairy products (most of which are processed outside of Wales) account for 17% of total GB dairy exports. Much of Welsh milk is processed into cheddar cheese, a major global commodity market. The other three main export groups are cereals, meat and meat products (mainly lamb and beef), fish and shell fish, which combined make up a value of £112 million. Only 2% of total Welsh export value is derived from food, compared with 4% in the GB and 6% in Scotland (excluding Scottish whisky).

The Food Strategy placed more emphasis on branding the export of Welsh foods through **communicating the sustainable forms and practices of agricultural production**. This message has largely been lost²³, and it is now a much larger issue, especially in the red meat sector, where consumer opposition to carbon emissions from upland livestock farming systems is growing (especially since the recent Paris summit²⁴, and the promotion of alternative, vegetarian diets are being promoted by many authoritative health organisations (including the World Health Organisation). Hybu Cig Cymru (HCC), the main promotional and levy body for Welsh red meat, are clearly aware of these challenges (HCC, 2016). Limited work is already underway. The overarching identity which has been used at UK and

²¹ Welsh Government's Internal Food Policy Group, which is working to join up the work being undertaken on food across departments to ensure work is linked to the 2014 Action Plan and the Well-being of Future Generations (Wales) Act 2015, goes some way to doing this but more can be done.

²² For instance, the work initiated under the recent Food for the Future and All Wales Food Poverty Alliance initiatives, such as FareShare, needs to be continuously developed and put on a more established and funded basis with the full range of stakeholders (see <http://businesswales.gov.wales/foodanddrink/food-future>).

²³ Though the Agricultural and Horticulture Development Board (AHDB), a statutory levy board, do provide some advice and guidance to industry on sustainable practices.

²⁴ See www.cop.21.gouv.fr/en/

international exhibitions, Bwyd a Diod Cymru, is currently being redefined to tell the story of Welsh food and drink, and the Food and Drink Wales website goes some way to improve communications with industry, promote business support, report on trade successes and provide information on policy developments and new opportunities. **However, more concerted effort is now needed both in market promotion, coherent and consistent branding and in progressing sustainable farming methods especially in the red meat sector.**

There is an urgent need for the Welsh Government to espouse more diverse sustainable production and processing and to specify how this is being progressed. This does not need to be one-dimensional, and we would suggest that the Welsh Government consider enhancing the diversity of sustainable production and processing methods – from agro-ecological, through organics, and to the further greening of the conventional sector. Recent research has shown that Wales has made more progress through producer group innovation, small scale ‘alternative and niche production’ systems over recent years but that this is not necessarily being recognised, promoted or mainstreamed (Adams, 2015). More emphasis needs to be placed upon badging the diverse and high quality production practices in Wales, and using these to create and retain larger market share both nationally and internationally. There is in many policy circles then, a perception that the Wales agri-food sector is still the provider of bulk conventional products, most of which become processed outside of Wales.

Multiplying the number and density of more sustainable ‘short supply chains’

Welsh consumers should be able to have easier access to a wider variety of Welsh local and regional products. This requires both **the development of incentives for smaller producers of artisanal products and the development of processing and marketing channels to deliver these products in the existing range of retail outlets.** Recent schemes announced under the Rural Development Programme (2014-20) such as the Food Business Investment Scheme, Sustainable Management Scheme, Sustainable Production Grant Scheme, Co-operation and Supply Chain Development Scheme and Farming Connect Programme, should be targeted towards stimulating this transition and mainstreaming.

Progressing research and development in sustainable production and consumption systems

There is a need, associated with the above, for a far stronger emphasis upon developing both funding and the diversity of R&D and its related extension and demonstration services in the

Wales agri-food sector. Whilst there are a series of start-up initiatives there is no coordinated strategy here and few connections with wider EU and UK R&D initiatives²⁵. The withdrawal of funding for Organic Centre Wales²⁶ is a case in point. The UK food and drink manufacturers spent £425 million on R&D in 2013, with Wales spending only £4 million, down from £7 million in 2011. The figures suggest that the trends are running counter to the UK trend, suggesting Wales is underspending on R&D by over £17million. **We suggest this needs addressing by developing a collaborative and coordinated national infrastructure in Wales** on Agri-food R&D involving HEIs, existing centres of research excellence and the existing food centres (Food Innovation Wales). This should be independent from Welsh Government and establish a strong partnership between HEIs, the existing food centres and the food industry sectors, developing the business clusters programme and embracing the farm and food service sectors.

Expanding horticulture

More concerted effort needs to be placed on enhancing and **developing the sustainable horticultural sector in Wales**²⁷. The Strategic Framework for Agriculture contains the current vision for developing a sustainable horticulture identity for Wales, while some support is available to growers aiming to improve their practice through the RDP. Regardless, a new, revised sector partnership board needs setting up, building on the Horticulture Wales experience (which was allowed to fold after its funding ran out in 2015) and its grower-led successor Growers of Wales²⁸. There has been an increase in horticultural holdings (to over 500) in recent years, but this has the potential to triple over the next five years, aided by more land release and the provision of incentives and support for new horticultural producers, including for training and skills development. Significantly more Welsh self-sufficiency could be achieved, by developing the horticultural land base (from its low level of 0.1% to around 2.8% of total agricultural land area, and in tandem developing short horticultural supply chains and retail outlets)²⁹. Changes in the minimum thresholds of five hectares regarding eligibility

²⁵ The £20 million EU European Regional Development Fund (ERDF) funding at Gogerddan Aberystwyth is one example which needs to be connected to a wider and coordinated food innovation web and clusters across Wales.

²⁶ See <http://www.organiccentrewales.org.uk/about.php>

²⁷ The Wales Horticulture Strategy and the Community Growing Action Plan 2010 are soon to be reviewed and should take heed of this recommendation.

²⁸ See <http://growersofwales.cymru/>

²⁹ We acknowledge the valuable work of Amber Wheeler on the sector and the work done as part of the PLANED Pembrokeshire Horticultural study (see <http://foodmanifesto.wales/2015/09/25/beyond-5-a-day/>)

for CAP support could assist in providing incentives for small producers to develop horticultural enterprises.

Building infrastructure for the ‘missing middle’

More emphasis needs to be placed on **investment in the ‘missing middle’ of the Wales food chains**. These are the **gaps in physical and digital infrastructure** which continue to expand food miles and create bottlenecks in retail food as local, regional and based upon shorter supply chains. If our local and regional procurement strategies are to be met, improved local infrastructures will be crucial, including the development of food distribution hubs. We need an investment programme specifically on this agenda. In the 2015 Food and Drink Producer Survey conducted by Strategic Marketing, 83% of businesses distribute their own products to market, whilst only 4% collaborate with other businesses (Strategic Marketing, 2015). We need to develop a clear strategy for developing local and regional collaborative food hub businesses across Wales. Urgent progress and its monitoring is needed relating to the provision of superfast broad band facilities across rural Wales, digital infrastructure in which Welsh Government is already investing

Rural development and food

We need more **integration between an overall rural development strategy for Wales and a revised agri-food strategy** which expresses a clear vision. Currently we really do not have either, with rural development being seen as analogous with the CAP Rural Development Plan and the Strategic Framework for Agriculture still in its early phase of development. Funding from this stream needs targeting in a revised agri-food strategy, and linkages being made to delivering rural development and food developments which foster the other recommendations here.

Support for the community food sector

Local authorities in particular have the potential to play a wider role in fostering **community food initiatives both in and, importantly, between urban and rural locations**. Community gardening, farming and retailing should be facilitated far more proactively through local policies, especially planning policies. The community food dimension should form a part of local authorities’ contributions to well-being plans and public service boards. Clearly LEADER and the wider RDP funding is also relevant here and the criteria for applying for these revenue streams needs to be broadened so as to encourage local (urban as well as rural) community

groups. Expanding significantly and continuously supporting Community Supported Agriculture and community food cooperatives across Wales is a priority here³⁰.

Renewed network of partnerships

Wales has several industry-led organisations including the Food and Drink Wales Industry Board, the Welsh Dairy Leadership Board, Hybu Cig Cymru and the Seafish Wales Advisory Committee. Nonetheless, there is an urgent need to **create a series of active Partnership Boards for the main producer sectors**, (dairy, beef, lamb, fish, horticulture, poultry, organics, mixed farming etc.) so as to build an effective ‘guild-like’ community of practice and innovation network around each of them. These need to advise but be independent of the Welsh Government, and be constituted by members across the supply chains they represent (including consumers). These partnerships need to include and actively encourage community groups, food councils and urban as well as rural interests in delivering sustainable diets, through sustainable food supply chains.

Robust data and monitoring

Effective data collection, food resilience and insecurity monitoring and appropriate indicators are essential to monitoring both the evolution of the food system in Wales and the impact of food policy in Wales. The increasing penetration of technology and possibilities for cheap and intelligent communication systems built into everyday processes mean that the possibilities for data collection and the costs associated with it are less and less of an excuse. Welsh Government have established some industry baseline data, in line with objective 12 in the 2014 Action Plan, and have several research projects underway to complement the economic appraisal and support specific policy requirements (e.g. the Dairy Feasibility Study). However, more needs to be done. Strategic food policy must embrace the importance of data, as a tool to understand effective change. This needs to be coupled with principles of Open Data so that politicians and policy-makers can be held accountable, communities can identify their own priorities, advocates can make better arguments and businesses can make better commercial decisions. It is notable that this is one argument that was resisted during the development of the 2010 Food Strategy.

³⁰ The work of the Rural Regeneration Unit (RRU) in supporting over 326 Community food Co-ops, and the Federation of City Farms and Community Gardens (Tyfu Fyny) is innovative and instructive here and needs continuous support and scaling up.

Cabinet Minister for Food

In order to insert and reflect strong and inclusive leadership, coordination and integration, and to tackle and take the national gravity of this policy area into the heart of government policy making, we would now recommend **the appointment of a full Cabinet Minister for Food**. This would explicitly incorporate farming and rural affairs, and centrally tackle Food and Nutritional Security; an innovative step change which is now being increasingly recognised as a necessary step in European and global policy, business and civic society fora. This would also provide more communicable and collective political leadership to complement the work of Welsh Government officials.

Summary of recommendations: Towards proactive and reflexive food governance

Based on the above, the following recommendations are made. These are designed as a set of interconnected and mutually reinforcing policy priorities and areas of activity which together can constitute part of the refreshed and collective strategic vision needed. In doing this they also provide an improved means of developing a food governance model which mainstreams sustainable and more diversified production and consumption, and communicates and disseminates this to the Welsh public and the world beyond.

1. Invest in existing procurement professionals and also in new Specialist Procurement Officers across the public sector. These professionals must be supported by the strategic policy framework and, crucially the stakeholders and the organisational level they are ultimately purchasing on behalf of.
2. Demonstrate the Welsh Government's commitment to good food by adopting the Food for Life Catering Mark across Welsh Government catering services and by promoting its uptake among delivery partners across Wales.
3. Place sustainable diets at the heart of food and nutritional policy through adopting successful public health interventions such as Food for Life and bolstering public sector food procurement and catering provision.
4. Provide support for farmers to produce less intensive, more sustainable, and higher food quality products through more diversified sets of supply chains.
5. Encourage and aid consumption habits that are in line with Welsh food policy goals and the Well-being of Future Generations act.
6. Increase communication of the sustainable forms and practices of agricultural production through the branding of Welsh foods.

7. Multiply the number and density of more sustainable 'short supply chains' through the development of incentives for smaller producers of artisanal products and the development of processing and marketing channels to deliver these products.
8. Develop funding mechanisms for greater and more diverse R&D, and related extension and demonstration services, to support sustainable production and consumption systems in Wales. In particular, there is a need to develop a collaborative and coordinated national infrastructure in Wales.
9. Expand and develop the sustainable horticulture sector in Wales.
10. Increase investment in the 'missing middle' infrastructure of the Wales food supply chains, in particular gaps in the physical and digital infrastructure.
11. Develop an overall rural development strategy for Wales and a revised agri-food strategy. These should be integrated.
12. Increase support for the community food sector through community food initiatives;
13. Create and sustain food sector Partnership Boards for the main producer sectors to build community of practice and innovation networks.
14. Introduce effective data collection and monitoring of the Welsh Government's Food Policy in line with the Well-being of Future Generation Act goals and coupled with the principles of Open Data.
15. Appointment a full Welsh Government Cabinet Minister for Food.

Conclusions: Food Policy as Public Policy

Weaknesses and blockages in the governance of food policy in Wales since 2010, coupled now with a greater understanding on the interconnected vulnerabilities which underpin sustainable food systems, mean that there is an urgent need to develop a fresh and clear vision and strategy for the food system in Wales.

This needs to build on the two policy documents we have reviewed here, but not become victims of them. While there is some good initial work already underway in Wales, more needs to be done. This work needs to be built upon, be seen as less fragmented and project-by-project focussed, and part of a communicated, coherent and strategic vision achievable over five, ten and fifteen year periods. Policy inertia and fragmentation is no longer an option, as the social, health, economic and environmental costs are too great. Evidence suggests that if these issues are not addressed urgently, then the wider range of risks and vulnerabilities will continue to significantly increase. This will further reduce national economic, social and environmental capacity. There is a need therefore for a refreshed vision for Welsh food and

farming which can be developed, back-casted and serve as a way of integrating and communicating the key dimensions and recommendations we propose here.

Sustainable food, farming and diet need to be integrated into an overall strategy at the centre of Welsh Government policy. This needs to be complemented and connected by a decentred partnership framework across the expanding policy and stakeholder food community which now inhabits this enlarged field. These elements need to play a leading part in delivering and contributing to *all* of the Well-being of Future Generations Act's well-being principles and goals, and be monitored as such. Food and nutritional policy should thus aim to deliver improvements on an annual reporting basis to the seven key Well-being goals³¹.

In this sense a revitalised and integrated food policy as central public policy – one which directly addresses the current widening gaps identified in this report – should aim to perform a central 'spinal cord' role for the delivery of a sustainable Wales for present and future generations.

³¹ These are: a prosperous Wales, a resilient Wales, a healthier Wales, a more equal Wales, a Wales of cohesive communities, a Wales of vibrant culture and thriving Welsh language, and a globally responsible Wales.

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Annex 1: The Food for Wales, Food from Wales 2010:2020

Vision Statement

A vision of how the industry could look in 2020 following adoption of the direction set out in this Strategy.

In 2020 we can say clearly that over the last ten years we have witnessed a significant improvement in the reputation of, and value attached to Welsh food following the step change in our approach to food policy. Wales is now frequently identified by reference to its high quality, natural and wholesome food. Consumers increasingly look to source these products from a wide selection of outlets. We can see that the planned improvements in the quality and diversity of bulk foods has been achieved – making good healthy food more accessible and desirable for all. In international markets too, food produced here enjoys an increasingly high market share.

These improvements have been achieved through the efforts of farmers, fishermen, food processors, retailers, caterers, health professionals, educators and Government working together towards a shared goal with a clear understanding of what is needed. Government has facilitated the sharing of ideas and best practice to improve uptake of healthy food options. The consultation in 2010 opened up a wider debate which served to make policy more integrated across policy areas outside food production and processing. The decision to create and agree an overarching industry strategy from a wider food ‘system’ position was a key factor in that success. Through this collective effort, food is fully integrated into our thinking and our actions, on issues as diverse as culture, health, inequality, natural and built landscapes, waste, education, transport, energy, and the economy. Food is also embedded into our long-term approach to economic resilience and security.

Consumers are increasingly appreciative of our products, and our producers are far more focussed on their nutrition needs as part of a balanced diet. We have a strong food sector which trades to economic advantage on the global market and continues to add increasingly to the economy of Wales through increased export revenue and employment.

The tourism sector is stronger as a result of the attraction of such an agreeable food experience. Communities are benefiting as they contribute to meeting the need for more food for consumers. Food producers have significantly increased production and are proactive protectors of the environment. There is a clear recognition of the health benefits attached to greater food consciousness on the part of consumers, promoted by both educational and food

procurement initiatives. Food is a central part of education and there is strong evidence that many more people of all ages are attaining qualifications. All those working in the supply chain are benefiting from the enhanced skills sets now at our disposal. The Food Strategy continues to be relevant and flexible to change, taking advantage of the existing evidence base for evaluation and review as well as the genuine and close partnership working that has become central to the delivery of developments as circumstance and policy drivers change.



Annex 2: List of 48 Actions from Towards Sustainable Growth: An action plan for the Food and Drink Industry 2014-2020

1. The Board which will have a food industry appointed Chairman and the group will:
 - a. (i) Provide leadership and direction to support industry growth.
 - b. (ii) Develop a detailed terms of reference in agreement with Welsh Government.
 - c. (iii) Take ownership of this Action Plan and further develop it appropriately in relation to industry consensus and need.
 - d. (iv) Advise Welsh Government on industry challenges opportunities, and government interventions.
 - e. (v) Advise on and develop knowledge transfer networks to communicate and develop the industry – may be sub-sector based or themed.
 - f. (vi) Periodically report to Welsh Government on its activities and the outputs and outcomes achieved.
2. Welsh Government will further develop the new trade identity building on, Food and Drink Wales/Bwyd a Diod Cymru, through a distinct set of provenance indicators that convey confidence in the qualities and traceability of Welsh Food.
3. Develop a new approach to food industry awards to encompass all Welsh Government's food policy priorities following full consideration of all existing Welsh Government awards to industry and all private sector recognised awards schemes.
4. Develop a skilled and capable workforce through developing key partnerships in the 'skills supply chain' by engagement with Secondary and Higher Education, manufacturing businesses and stakeholders' interests.
5. Address skills gaps across the Food Supply Chain through devising/ revising training and skills programme. The development of food industry competencies will also be taken forward.
6. Create awareness and promote careers in the food supply chain.
7. Support the implementation of the recommendations from the Food & Drink Skills Council produced by the Sector Skills Board.
8. Create innovative, novel approaches and incentives to encourage industry training for SME businesses.
9. Adopt the Knowledge Information Technology Exchange (Kite) approach of industry and academia collaboration where graduates are placed in industry to lead/ support advances in technology and innovation. Extend this to cover a wider range of tailored services,

including process engineering, packaging, marketing and distribution to food and drink businesses in Wales.

10. Encourage more food businesses to prioritise training and continued professional development.
11. Welsh Government will seek to ensure that all opportunities to promote the Welsh language, through food policy generally and trade through the action plan, are explored and taken up where appropriate. This will include opportunities at trade and cultural events.
12. Improve industry baseline data and fill knowledge gaps through commissioning research, purchasing relevant and credible market, industry and consumer data. This will provide insight and fine tune market development strategy and implementation.
13. Welsh Government to prioritise the largest (key) food/drink companies in Wales through key account management and applying anchor company principles.
14. Welsh Government to manage the development of the Small Medium Enterprise (SME) sector on a key sectoral management approach. The sub sectors are meat, dairy, fisheries, bakery, horticulture, poultry/eggs, drinks, animal feed and ready to heat/eat (packaged grocery).
15. Investigate the advantages and disadvantages to all sub sectors from developing a 'Levy Hub' for Wales in relation to using levy money collected from producers and processors to the Welsh food industry's best advantage.
16. Investigate the development of a single access gateway (business hub) for food businesses, via Business Wales, to communicate the business development and support services available. This will also identify the most appropriate service to meet their needs, and enable easy access to that service.
17. Ensure RDP 2014-2020 provides business and processing support schemes that are appropriate to the food sector. This will require close working and integration across all government departments.
18. Ensure that all sources of EU, Welsh Government and other financial support (grants, flexible loans and other) to food businesses is appropriate, coordinated, widely publicised and used to maximum advantage to grow the sector.
19. Extend and enhance the mentoring support to more SMEs and micro food businesses.
20. Support industry innovation through:
 - a. (i) Develop a new knowledge transfer network in the sector in Wales to promote dissemination and uptake of latest technologies.
 - b. (ii) Refine and procure services to provide support to the industry regarding product and process development, packaging, distribution, and waste management.

- c. (iii) Stimulate research where innovation is needed to address industry problems (e.g. management/disposal of contaminated plastic waste and metal based packaging waste).
- 21. Develop an ongoing programme of food chain networking events in Wales to bring together business representatives from the whole of the supply chain.
- 22. Refocus Supply Chain Efficiencies (SCE) provision under new RDP 2014-2020, to ensure more support towards supply chain integration.
- 23. Develop options for a food distribution/ operations plan for food businesses in Wales to overcome the problems and costs faced by small businesses accessing the marketplace.
- 24. Develop strong working links and a regular dialogue with the Wales Retail Consortium (WRC) and the British Retail Consortium (BRC).
- 25. Revise export trade supports to be more focused, pro-active, responsive and offer more flexibility to food businesses in Wales. Maximise the impact of a bold, strong and clear national identity under the Food and Drink Wales Identity banner and collaborate with UK Trade & Industry (UKTI) and DEFRA to maximise the impact of a UK presence at trade events, while retaining our distinctive national identity.
- 26. Provide new opportunities for export growth through:
 - a. (i) More planning and targeting of potential export markets, including the more challenging emerging markets.
 - b. (ii) Close working between Welsh Government, the UK Government and other devolved administrations, to improve collaboration, including to overcome market access issues.
 - c. (iii) Extend the range of methods/channels used in more established export markets.
 - d. (iv) Identify more Welsh businesses with export potential and provide enhanced support, including financial, to develop and extend their capabilities for international trade.
- 27. Work with businesses to fully exploit opportunities for more Protected Food Names (PFNs) for Welsh produce and their export development. Also to actively promote PFN products to customers.
- 28. Foreign Direct Investment (FDI):
 - a. (i) Refine the FDI offer package to encompass all of the advantages Wales has to offer, including a skilled workforce, proximity of raw materials and market, cost effective growth base, R&D support, and enabling government.
 - b. (ii) Using this package as a means to promote Wales as one of the best locations for inward investment, in the UK and internationally, and working closely across

Welsh Government departments, including UK and overseas offices, to encourage greater generation of 'leads' and attract increased rates of inward investment into Wales.

- c. (iii) Ensure aftercare support to inward investments is in place where appropriate, to support further growth and job creation.
29. Ensure adequate availability and access to property for processing of primary products and food manufacturing generally. The provision should include premises for incubation/ starter units, expansion and inward investment which will support new and developing food businesses.
 30. Enable public sector market opportunities to be developed for the food industry and in particular SME and micro food businesses.
 31. Welsh Government will develop a generic 'local toolkit' to support businesses that wish to target and develop local markets including local retail (direct/indirect), tourism and public sector.
 32. Encourage Welsh caterers to use Welsh produce including increased use of logos and emblems (e.g. on menus, advertising). Food and Drink Wales Identity and other supporting identities.
 33. Collaborate with sector partners on joint market development and promotional activities.
 34. Work with Visit Wales and map out all of the 'tourism' partners that can contribute to the Food Tourism Action Plan.
 35. Develop a joint plan of action with Visit Wales to deliver synergistic food and tourism benefits through both Visit Wales Strategy and Towards Sustainable Growth: An Action Plan for the Food and Drink Industry 2014–2020 – Publish an annual action plan which will include joint marketing, skills development, and collaborative opportunities through partnering established players.
 36. Provide grant assistance to a range of business and community led events, tourist attractions, in Wales capable of raising the profile of the Welsh food and drinks industry. Refine the process of identifying the most appropriate support for individual events which recognises the wider initiatives and added value of many events to local economic development, educational activity and market development (e.g. meet the buyer).
 37. Establish a Food Policy Group to ensure food policy issues are considered across Welsh Government departments. The group's role would be to achieve improved policy join-up across government where food is a consideration in broader policy development. Linking with Education, Health and Economy/ Science/ Transport will be a priority.
 38. The Welsh Government will work closely with food security and food safety stakeholders to achieve holistic approach to sustaining the food production base in Wales and to protect

consumers. The FSA, the Food Fraud Coordination Unit, Local Authorities, and the planned Centre of Excellence for Food Security/Food Safety at Swansea will be key players.

39. Consider the development of a National Food & Nutrition Strategy and/or a Public Health Bill for Wales.
40. Promote healthy eating and drinking in schools through the Healthy Eating in Schools (Wales) Measure 2009 and Healthy Eating in Schools (Nutritional Standards and Requirements) (Wales) Regulations 2013.
41. Consider all opportunities to develop a healthy lifestyle eating culture in schools including the teaching of growing, preparing, cooking, balancing diet and exercise. Continuing FSA engagement with schools in some of Wales' most deprived communities on food safety and standards.
42. Promote healthy eating and drinking in:
 - a. (i) Public sector settings, implementing Welsh Government Guidance for early years settings, leisure centres, youth centres, hospitals and care setting.
 - b. (ii) In workplaces and all catering outlets, including vending machines.
43. Promote and support the improvement of recognised food safety assurances/ accreditations of food and feed businesses to ensure food safety, improve market access which may also reduce the number of compliance inspections.
44. Develop a Welsh Government proposition on Green Growth for business which will promote Wales as the destination for establishing and growing compliant businesses that are environmentally and socially responsible.
45. Improve access and affordability of food for all, providing choices that contribute to a healthy balanced diet, particularly in deprived communities.
46. Welsh Government to promote Wales as a low carbon food production country through ensuring effective signposting and easy access to environmental service providers that work with businesses to improve resource efficiency and reduce their ecological footprint.
47. Further develop the sub-sector roadmaps extending to all the sub-sectors to assist food businesses to reduce their ecological footprint.
48. Develop and promote Corporate Social Responsibility (CSR) for food chain businesses.

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